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Wealthtech Weekly

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By **Rob Burgess**

Reporter

This time of year presents an opportunity to review the progress of the past 12 months. In that spirit, I combed through my story list, and it turns out I wrote a whole lot about AI in 2025. [Here are 10 lessons](#) I took away from the trends I saw.

What do you think were some of the most important AI storylines in wealth management this year? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

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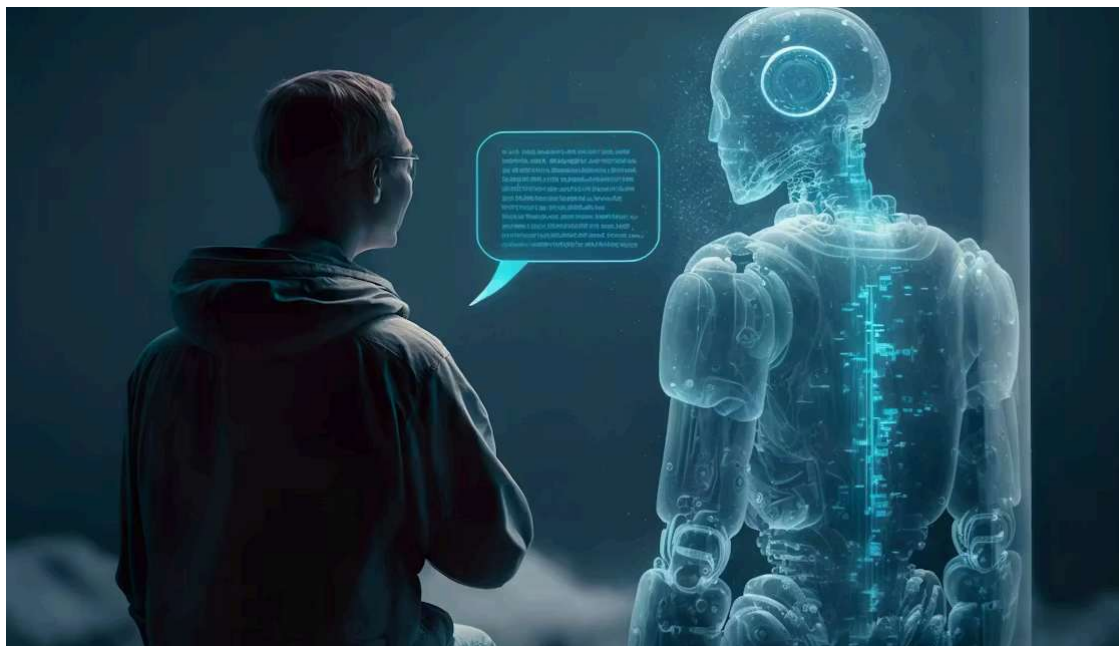
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TOP STORIES

TECHNOLOGY

10 lessons from AI's transformative year in wealth management



Yes, AI is saving many advisors time and helping them reach prospects. But some say the rapid rate of adoption and automation could put them out of a job in the future.

- **10 experts predict what's next for investing in 2026**

From crypto to private markets to AI and beyond, here are the investing trends and themes to watch in the new year.

- **20 people who will shape wealth management in 2026**

Charles Schwab CEO Rick Wurster, IRS CEO and Social Security Administration Commissioner Frank Bisignano and iCapital's Chief Investment Strategist Sonali Basak made the list — see who else did.

- **Could rescheduling make marijuana investments viable?**

President Donald Trump is reportedly considering moving cannabis from a Schedule I to Schedule III substance. Experts say this could go a long way toward establishing the industry's legitimacy.

- **An advisor's year-end playbook: Client deadlines, firm strategy and finishing strong**

As deadlines loom, firms juggle tax-driven client work with retreats, reflection and recalibrating the business for 2026.

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